rate up significantly. Understandably, women would have a higher IP than men. But the presence of a child with a man drives the purchase rate up almost double (7.20 for a man to 13.33 for a man with a child). The purchase rate for a woman alone is 13.66, less than the 14.13 average, but with a child it jumps to 16.12. With two or more women and a child, it climbs to 28.57.

Baking needs. Although baking needs shoppers fall into roughly the same buying patterns as baking mix buyers, retailers don't seem to get the mileage they should out of baking needs promotions. Manufacturers strongly boost baking needs with newspaper coupons (23.4% of the items were so promoted), while retailers promote only their flour, pie fillings, chocolate bits and extracts with newspaper coupons to the tune of 7.5%. Yet the purchase rate for manufacturer newspaper coupons is 5.43 buys per 100 shoppers, while the IP with retailer newspaper coupons is 10.13—nearly double the figure.

The most heavily used product in this category is flour, coming in at 7.52 purchases per 100 shoppers, a figure that equals several other entire categories, such as desserts and gelatins.

Interestingly, retailers do recognize the drawing power of flour, and promote it to the point where only 29.5% of all flour purchases are not boosted by ads, coupons or circulars.

Nevertheless, flour is not promoted in the most effective way by retailers. IP jumps to 14.81 (from 5.57) with the help of store ads and coupons, but only 13.7% of the purchases are hyped by these two promotional aids. In contrast, 31.2% of flour bought is done so in conjunction with store ads alone. The IP with store ads is 6.64, less than half the purchase rate than with store ads and coupons.

Unlike baking mixes, baking needs are more sensitive to media advertising than to display ads. With displays, IP rises 84%. With advertising, the purchase rate skyrockets 172%. With both advertising and display, however, that figure inches upward to only 177%, suggesting that the additional cost of advertising is not worth the investment.

Baking needs also react strongly to shopping lists, as well as to the presence of newspaper advertising and coupon redemption. Those who consulted ads purchased at a rate 70% greater than those who did not. Those who redeemed coupons bought baking needs at twice the rate of those who did not, and those who prepared shopping lists took home baking ingredients at almost double the rate of those who did not.

Chocolate Flavored Chip
FROSTING MIX
Creamy White
FROSTING MIX
Sunkist Lemon
FROSTING MIX
Sunkist
HOT TIPS
People who buy cake mixes are
• 3.5 times as likely to buy baking ingredients
• 1.9 times as likely to buy canned fruits
• 1.8 times as likely to buy margarine
• 1.4 times as likely to buy fresh fruits
• Equally likely to buy butter
Betty Crocker
Creamy White
FROSTING MIX
FUN FROSTING IDEAS

Incidence of purchase: all shoppers

Product	All shoppers
Bread, white	**37.99**
Private label	4.17

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Bread, white	**100.0**	**44.0**	**23.5**	**4.1**	**1.1**	**27.3**	**66.0**
Private label	100.0	38.3	37.0	3.1	1.9	19.8	61.7

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bread, white	**6.33**	**4.59**	**18.61**	**17.29**	**21.56**
Private label	4.17	2.62	5.08	8.16	3.51

Purchasers of baking ingredients behaved like baking mix buyers in similar age groups. The under-20 class bought at the quickest pace, while the 20-29 category purchased at the slowest. Presumably, this can be explained by employment figures, which show that women 20 to 29 are more likely to be employed—and therefore less likely to devote time to baking.

The employment survey shows that female shoppers who are out of work buy at a higher frequency. Employed women purchase baking ingredients at a rate of 20.48 per 100, while unemployed women buy at 27.24. The IP for all female shoppers is 25.07.

Judging by income, it would seem that those making more money would do less baking and therefore buy fewer baking ingredients. But the data reflects the opposite behavior pattern: Those making more than $25,000 recorded the highest purchase rate, 28.99. The under-$4,000 group have the lowest purchase frequency (20.06).

The shopping composition figures show a steady IP for most buying configurations, except for those including men. While the presence of a woman or child means a purchase rate of 24 or 25 buys per 100, a man who goes shopping alone will buy baking needs at a rate just under 13 purchases per 100 shoppers.

White bread. White bread is

Incidence of purchase: all shoppers

Product	All shoppers
Bread, other, croutons	**14.98**
Diet bread	1.03
Rye bread	2.93
Bread, whole wheat, other dark	6.69
Raisin bread	0.44
Stuffing bread, croutons, crumbs	3.89

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bread, other, croutons	**3.00**	**2.51**	**3.71**	**4.85**	**5.77**
Diet bread	1.03	0.92	5.26	6.90	
Rye bread	2.93	2.75	1.61	4.62	
Bread, whole wheat, other dark	6.69	6.36	5.82	7.81	20.51
Raisin bread	0.44	0.40		2.74	
Stuffing bread, croutons, crumbs	3.89	3.87	3.46	3.39	5.17

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Bread, other, croutons	**100.0**	**36.9**	**19.2**	**4.1**	**1.9**	**37.8**	**73.1**
Diet bread	100.0	30.0	20.0	5.0	7.5	37.5	70.0
Rye bread	100.0	34.2	21.1	5.3	0.9	38.6	63.8
Bread, whole wheat, other dark	100.0	46.9	21.2	5.0	2.3	24.6	53.9
Raisin bread	100.0	5.9	23.5	5.9	5.9	58.8	94.1
Stuffing bread, croutons, crumbs	100.0	27.2	13.9	1.3		57.6	72.8

Incidence of purchase: advertising and displays

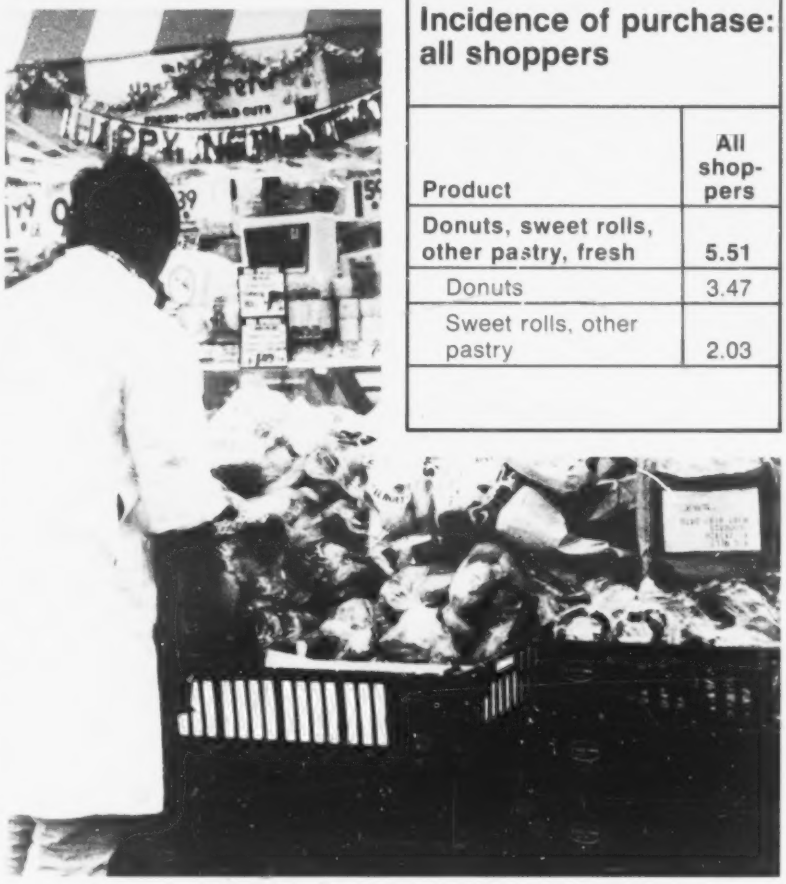
Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Donuts, sweet rolls, other pastry, fresh	**2.75**	**2.37**	**2.61**	**3.66**	**6.80**
Donuts	3.47	2.72	3.24	5.22	11.46
Sweet rolls, other pastry	2.03	2.02	2.11	1.91	2.73

considered to be an American staple, yet the store decision rate is 66%, greater than the 64.8% average for all items in the food store. The unplanned level is a low 27.3%, much lower than the 46.8% level for all supermarket products. All this leads to the conclusion that white bread is subject to a bombardment of in-store influences. The figures show that nearly a quarter of all buyers intend to buy some white bread when they go shopping, but they don't make up their minds until they get into the store. As such, the category is very susceptible to in-store influences.

Incidence of purchase for white bread is 37.99, an indication that it is one of the most widely bought food items. Private label garners 4.17 purchases per hundred, making it the single most popular brand in the category.

Both display and advertising have ballooning effects on white bread purchases, with display boosting IP threefold and advertising 280%. The two merchandising aids, when employed together, do not do much better when used alone; IP rises 370%, suggesting that in-store displays alone may be sufficient.

White bread responds spec-



Incidence of purchase: all shoppers

Product	All shoppers
Donuts, sweet rolls, other pastry, fresh	**5.51**
Donuts	3.47
Sweet rolls, other pastry	2.03

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+	Substitute brand product		+	Unplanned	=	Store decision
Donuts, sweet rolls, other pastry, fresh	100.0	19.2	10.7		0.9	1.9		67.3		80.8
Sugar & sugar substitutes	100.0	38.6	20.4		0.9	0.3		38.8		61.4
Oils & Shortenings	100.0	44.6	7.8		3.0			44.6		65.4

tacularly to promotion by store newspaper coupons and store ads, boosting the purchase rate sevenfold when the two are used together. Yet retailers have failed to jump at the bait, and only 1.1% of all white bread purchases are made in conjunction with store ads and coupons. Nearly a quarter of the purchases are made while store ads are running, however, and while not nearly as effective as ads and coupons, ads alone boost purchases fivefold.

Manufacturer newspaper coupons also have an inflationary effect on the purchase rate, hyping IP nearly fivefold. But manufacturers are in the same know-nothing category as retailers, and only 1.1% of the items purchased were bought with manufacturer newspaper coupons.

Younger shoppers are more inclined to buy white bread, probably because they have more sandwich-eating children and would be more likely to eat bag lunches at work. Purchase rates are roughly the same across all income groups, with a slight dip in the upper brackets, due to the inclination to buy more variety breads as income rises.

The purchase rates for larger households increases dramatically. For a one-person household, the IP is 30.72. This rises to 56.98 for a seven-person household.

The presence of a child in the shopping group also boosts the purchase rate significantly. A woman with a child has an IP of 44.21, 16% over the average purchase rate. A man with a child posts a 50 IP, 32% over average.

Variety breads. The pattern for variety breads is clear: the more popular the bread, the lower the store decision factor. Consequently, whole wheat bread, a common product in the American household with a purchase rate of 6.69 per 100 shoppers, has a com-

Incidence of purchase: all shoppers

Product	All shoppers
Sugar & sugar substitutes	**17.92**
Granulated sugar	11.53
Private label	3.63
Brown sugar	2.96
Confectioners' sugar	2.60
Sugar substitutes	0.82

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Oils & shortenings	**0.96**	**0.78**	**1.57**	**1.82**	**5.13**
Vegetable oils	0.96	0.81	1.17	1.92	4.98
Private label	0.72	0.62		2.26	
Vegetable shortenings	1.04	0.77	2.31	1.81	6.02
Private label	0.62	0.51	0.72		5.26
Pan sprays	0.67	0.65		1.20	

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Sugar & sugar substitutes	**2.24**	**1.85**	**2.15**	**5.48**	**11.07**
Granulated sugar	3.84	3.15	2.83	9.11	17.95
Private label	3.63	2.90	2.53	10.19	33.33
Brown sugar	1.48	1.31	1.03	4.04	2.63
Confectioners' sugar	1.30	1.04	3.14	1.06	
Sugar substitutes	0.82	0.77	0.85		10.53

paratively low store decision rating of 53.9. Simply put, nearly half of all shoppers have a specific brand of whole wheat in mind before they enter the store. Rye bread, the other staple among the many variety breads to hit the market in recent years, has a purchase rate of just under three per 100. One out of three shoppers knows the specific brand of rye he or she will buy before entering the store.

Variety breads also respond well to displays and advertising, although the reaction is not as great as for white bread. Variety bread purchase rates grow 48% through the use of in-store displays, while the purchase rate rises 93% through the use of advertising. With both promotional aids, IP jumps 130%. So if you have to decide whether to promote white bread or variety bread, white bread is the answer.

Like white bread, variety breads are sensitive to news ads, shopping lists and coupon redemption. The purchase rate for variety breads increases 29% when the product is boosted with news ads. Those who use shopping lists buy at a pace 48% greater than those who do not, and those who redeem coupons have a purchase rate 43% greater than those who do not.

Purchase rate for variety breads tends to rise as income grows, perhaps indicating that the well-to-do want more out of life than white bread. In the $7,000-$9,999 category, 12.31 purchases per 100 shoppers are made. In the $25,000 and over group, the figure is 18.18.

Doughnuts and pastries. As expected, doughnuts, pastries and sweet rolls have a very high level of in-store decisions, coming in at 80.8%. The unplanned factor is equally high—67.3%—leading one to believe that in-store displays are crucial here.

However, the purchase rate measurements give rise to an opposite conclusion. Displays boost IP a scant 10%, while advertising jumps the purchase rate 54%. Advertising and display skyrockets the IP 180%, making both promotions a good investment.

Retailers do not promote doughnuts and pastries with newspaper ads together. Nor do manufacturers get involved with coupons often enough to have measurable impact. But store ads alone double the purchase rate, and store coupons bump the IP up 120%. Store circulars perform somewhat effectively, bolstering IP 31%. Supermarket operators have a good feel for promotion here, because 25% of the doughnut and pastry sales are hyped with productive news ads.

Shoppers in their 30's and 40's buy the most pastries, and the study shows that those with larger households buy at a faster pace. Shoppers with seven-person households buy at more than double the rate of those living alone.

Those with higher incomes will also march to a quicker beat, although the pattern here is not so consistent. Poverty-level shoppers will purchase at a rate of 6.47, 17% greater than the category average of 5.51. The IP sinks to 4.36 for the $4,000-$6,999 group and 3.24 for those at the $7,000-$9,999 level. Inexplicably, IP jumps to 6.38 for those families with $10,000-$14,999 incomes, dropping back to 5.90 for those in the $15,000-$24,999 range and up to 7.13 for shoppers above $25,000 annual income.

Sugar and sugar substitutes. Although the store decision level is 61.4%, just under the 64.8% average for all categories, the unplanned purchase percentage stands at 38.8%, substantially below the average of 46.8%. Shoppers have a general idea to buy sugar before entering the store but make up their mind once inside, according to the 20.4% figure for generally planned purchases.

Sugar has a high IP of 17.92, making it one of the most popular items in the store. Nearly two-thirds of the purchases are of granulated sugar. Brown sugar and confectioners' sugar garner 17% and 15% of purchases respectively, while sugar substitutes account for a scant 5% of all purchases in this category.

Advertising dramatically increases the average purchase rate, pushing it up to 5.48 from 1.85 without any promotional aids. Display inches IP upward to 2.15, but the two promotional aids used together increase the purchase rate to 11.07, nearly six times the IP racked up without any promotional help.

Coupon redemption has the greatest booster effect upon purchases. The IP zooms to 31.98 when coupons are redeemed, compared to 14.60 when they are not. In contrast, purchase rate stands at 23.17 when newspaper ads are consulted, and 14.65 when they are not. Shopping lists have an even lesser effect, bringing IP to 21.93 when lists are used and 15.24 when they are not.

Incidence of purchase: all shoppers

Product	All shoppers
Oils & shortenings	**8.60**
Vegetable oils	4.81
Private label	0.72
Vegetable shortenings	3.11
Private label	0.62
Pan sprays	0.67

Oils and shortenings. In terms of buying decision patterns, oils and shortening follow roughly the same course as sugar does. The store decision figure is 65.4%, and the unplanned purchase statistic is 44.6%, slightly below the all-categories average 46.8%. Like sugar purchases, oil is a commodity sensitive to in-store influences.

With displays, the purchase rate nearly doubles. With advertising, it jumps up 133%. Both ads and display bring the IP to 5.13, an almost sixfold increase. According to the figures, ads and coupons seem a bit more worthwhile, since they drive the purchase rate up to 5.21 buys per 100 shoppers. But coupons alone will bring IP to 4.68, only 10% less efficient than ads and coupons or ads and displays in conjunction, making them the best way to go if cash is tight.

Best bets. The best bet is the obvious one: pairing cake mixes with baking ingredients. The match-up is so good that it deserves an exclamation point. People who buy cake mixes are 3.5 times as likely to buy baking ingredients. Also worthy of mention: shoppers who buy cake mixes are 1.4 times as likely to buy margarine, but are only equally likely to buy butter.

Bread buyers are 1.4 times as likely to buy luncheon meats, making the combination this category's best bet. Cold cereal, canned tuna and peanut butter also do fairly well when paired with bread. Malt beverages are an also-ran when paired with bread: Shoppers who buy bread are only 0.96 times as likely to buy with it a malt beverage. ■

Incidence of purchase: advertising and displays					
Product	Brand Average Purchase	No adv. and no display	No adv. and display	Adv. and no display	Adv. and display
Bottled or canned soda	0.93	0.64	2.93	2.74	7.75
Coffee, instant and regular	0.79	0.60	2.52	1.93	8.05
Tea and chocolate beverages, beverage mixes	0.64	0.55	1.27	1.10	1.67
Alcoholic beverages	0.35	0.22	2.51	1.09	2.41

Beverages: adding to a flourishing market

☐ Americans are more weight-conscious than ever before, so much so that two food writers have suggested that we are becoming a nation of "sugophobics." Nevertheless, the nation's sweet tooth is growing in direct proportion to our guilt over nourishing it, and that means that both soft drinks and diet beverages of all sorts are flourishing.

Both dollar sales and tonnage of carbonated beverages advanced steadily last year, and promotional activity by manufacturers and suppliers promise to make the coming year no different.

"Lite" beers, the trade wars between Miller Brewing Co. and Anheuser-Busch, and the skirmishes fostered among lesser companies by the two major brewers have turned the beer market into one of the most changeable food categories in the super.

A chill in Brazil put a crimp in coffee sales last year, but improved crops are expected to effect a comeback. Tea, an old reliable, keeps chugging along and, thanks to a national emphasis on nutrition, promises to remain a shelf staple. As such, beverages remain one of the best products to promote in the store.

Bottled and canned soda. For every 100 shoppers, 33.59 buy soft drinks. More simply, one out of every three shoppers buys soda, making it half as popular as fresh or frozen meat, one-third more popular than poultry, twice as popular as canned fruit juices, four times as popular as all housewares and hardware sold in supers and one-third more popular than frozen dinners.

It is an item that goes with everything, and as such should be promoted often and well. According to the Consumer Buying Habits Study, non-diet soft drinks correlate well with luncheon meats, beer and malt beverages, and ice. Diet soft drinks boost sales of other diet foods spectacularly (diet soda buyers are nearly four times as likely to buy other diet foods) and moderately stimulate purchases of snacks, frozen desserts and cheese.

The store decision factor for canned and bottled soda is understandably low, 55.9%, although store decisions for private label purchases are quite high. The reason: low prices often sway customers from more expensive national labels.

The purchase rate for soft drinks breaks down to 81% for non-diet drinks and 19% for diet drinks. Interestingly, private label accounts for only 10% of the purchases within the non-diet cate-

Incidence of purchase: all shoppers

Product	All shoppers
Bottled or canned soda	**33.59**
Diet soda	6.31
Private label	0.39
Non-diet soda	27.28
Colas	13.26
Private label	0.23
Ginger ale	2.03
Private label	0.36
Lemon/lime	4.89
Private label	0.05
Mixers	0.98
Private label	0.13
Root beer	1.11
Private label	0.13
Miscellaneous brands	3.96
Private label	1.36
Total private label	2.65

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Bottled or canned soda	**100.0**	**44.1**	**8.0**	**3.2**	**0.7**	**44.0**	**55.9**
Diet soda	100.0	46.9	11.4	3.3		38.4	53.1
Private label	100.0	26.7	20.0			53.3	73.3
Non-diet soda	100.0	43.5	7.2	3.2	0.8	45.3	56.5
Colas	100.0	51.8	5.2	2.9	0.6	39.4	48.2
Private label	100.0	22.2		11.1	11.1	55.6	77.8
Ginger ale	100.0	32.9	8.9	5.1		53.2	67.1
Private label	100.0	21.4		7.1		71.4	78.6
Lemon/lime	100.0	42.1	4.7	3.2	2.1	47.9	57.9
Private label	100.0					100.0	100.0
Mixers	100.0	21.1	10.5	5.3		63.2	78.9
Private label	100.0	20.0				80.0	80.0
Root beer	100.0	30.2	2.3	7.0	4.7	55.8	69.8
Private label	100.0	20.0				80.0	80.0
Miscellaneous brands	100.0	33.8	15.6	1.9		48.7	66.2
Private label	100.0	37.7	15.1	1.9		45.3	62.3
Total private label	100.0	30.1	10.7	2.9	1.0	55.3	69.9

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Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Bottled or canned soda	**0.93**	**0.64**	**2.93**	**2.74**	**7.75**
Diet soda	0.63	0.55	2.28	1.04	2.42
Private label	0.39	0.40			
Non-diet soda	1.05	0.68	3.03	3.68	8.56
Colas	2.65	1.56	4.52	6.86	11.19
Private label	0.23	0.24			
Ginger ale	0.51	0.46	1.15	1.72	5.26
Private label	0.36	0.36			
Lemon/lime	0.98	0.69	3.73	2.84	11.56
Private label	0.05	0.05			
Mixers	0.24	0.22	1.04	0.25	
Private label	0.13	0.13			
Root beer	0.28	0.21	0.31	2.63	13.79
Private label	0.13	0.13			3.26
Miscellaneous brands	1.32	0.98	2.04	2.49	2.87
Private label	1.36	0.83	3.45	5.56	2.36
Total private label	0.38	0.29	2.73	2.65	

gory and 7% of the buys within the diet group. Cola purchases make up half of the non-diet buys.

Advertising and display both work well in soft drink promotion, with display a bit more effective. The purchase rate increases 350% with displays. With advertising, the jump is 328%. With both promotions, the increase is more than 11 times.

According to the survey, manufacturers rarely promote soft drinks with newspaper or direct mail coupons—1.2% and .5% of the time, respectively—a surprising situation, given the robust purchase rates. With manufacturer newspaper coupons, purchase rate climbs 50%, but with direct mail coupons, the purchase rate skyrockets more than eight times.

Retailers don't have much better judgment. Only .4% of the purchases were bolstered by newspaper ads and coupons, yet the survey shows that incidence of purchase (IP) for soft drinks shoots up some 15 times when boosted with both promotional aids. Newspaper ads seem to be the most used promotional aid—13.7% of the time—and they increase purchase rates by 350%. Coupons are little used—1.7% of the time—increasing IP sixfold. Store circulars are not used often, either—3.3% of the purchases are made in conjunction with them—and purchase rates rise six times. Retailers fail to pro-

HOT TIPS

People who buy non-diet soda are

- **1.6 times as likely to buy ice cream**
- **1.5 times as likely to buy beer**
- **1.4 times as likely to buy luncheon meats**
- **1.3 times as likely to buy a fruit juice concentrate**
- **1.3 times as likely to buy hotdogs**

mote soft drinks 81% of the time.

Purchase rates tend to rise steadily through the income brackets, doubling from poverty level shoppers to those in the $25,000 or more category. Younger buyers tend to bring home more soft drinks, with those in the under 20 (41.98) and 30-39 (46.77) age groups recording the highest purchase rates. Those 60 and older showed the lowest IP, 20.95 purchases per 100 shoppers.

Alcoholic beverages. Like soft drinks, beer is a good sales stimulant, and the item with which it crosses best is tobacco; beer buyers are 3.3 times as likely to buy tobacco. Suds drinkers are also 1.6 times as likely to buy luncheon meats, 1.7 times as likely to pick up a book or magazine and 1.5 times as likely to purchase ice cream.

Buyers make store decisions to buy alcoholic beverages 67% of the time, a bit over the average for all items in the store. However, just over half of the purchases are unplanned. For beer, the store decision level is a low 61%, but for wine and spirits, the store decision statistic is a good deal higher—74.7% and 81.2%, respectively—probably in direct proportion to the advertising support producers give these three product lines. Beer accounts for 59% of the purchases in this category; wine, 35%; and spirits, 6%.

Display is the big booster for the category as a whole, jumping IP 11 times. Advertising bolsters purchase rates fivefold, but advertising and display together stimulate purchases a bit less than displays alone. Displays don't have as marked an effect on beer, boosting the IP sixfold. But, they have a great impact on wine (increasing it 13 times) and an even greater influence on spirits, skyrocketing purchases 39 times.

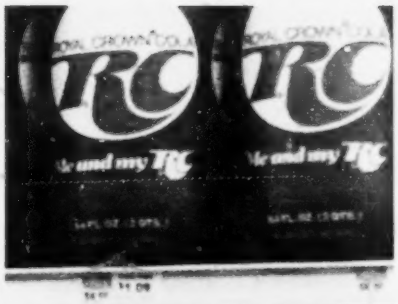
Coupons, either from retailers or manufacturers, store circulars and newspaper ads are not often used, but the study shows that retailers should be paying more attention to circulars. Although only 1.5% of the 270 alcoholic beverage purchases are attributable to circulars, the purchase rate nevertheless rises to 2.63 per 100 shoppers from the .32 buys made per 100 shoppers without any promotional support. Spirits respond better than wine and beer (for which the main support is television and radio), jumping from .25 to 5.26 with the help of store circulars.

Purchase rates noticeably differ when various age and income groups are examined. They rise

HOT TIPS

People who buy diet soda are

- **3.4 times as likely to buy diet foods**
- **1.8 times as likely to buy cheese**
- **1.5 times as likely to buy snacks**
- **1.5 times as likely to buy frozen desserts**
- **1.3 times as likely to buy candy and gum**



Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Alcoholic beverages	**100.0**	**33.0**	**13.3**	**1.5**	**0.7**	**51.5**	**67.0**
Beer, ale & liquors	100.0	39.0	6.9	1.3		52.8	61.0
Wine	100.0	25.3	22.1	1.1	2.1	49.5	74.7
Spirits	100.0	18.8	25.0	6.3		50.0	81.2

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Alcoholic beverages	**0.35**	**0.22**	**2.51**	**1.09**	**2.41**
Beer, ale & malt liquors	0.27	0.22	1.49	1.26	1.77
Wine	0.61	0.24	3.39	0.38	2.67
Spirits	0.41	0.11	4.39	1.96	3.57

steadily as income goes up, with those in the $25,000 and over bracket purchasing at three times the rate of those in the under $4,000 category.

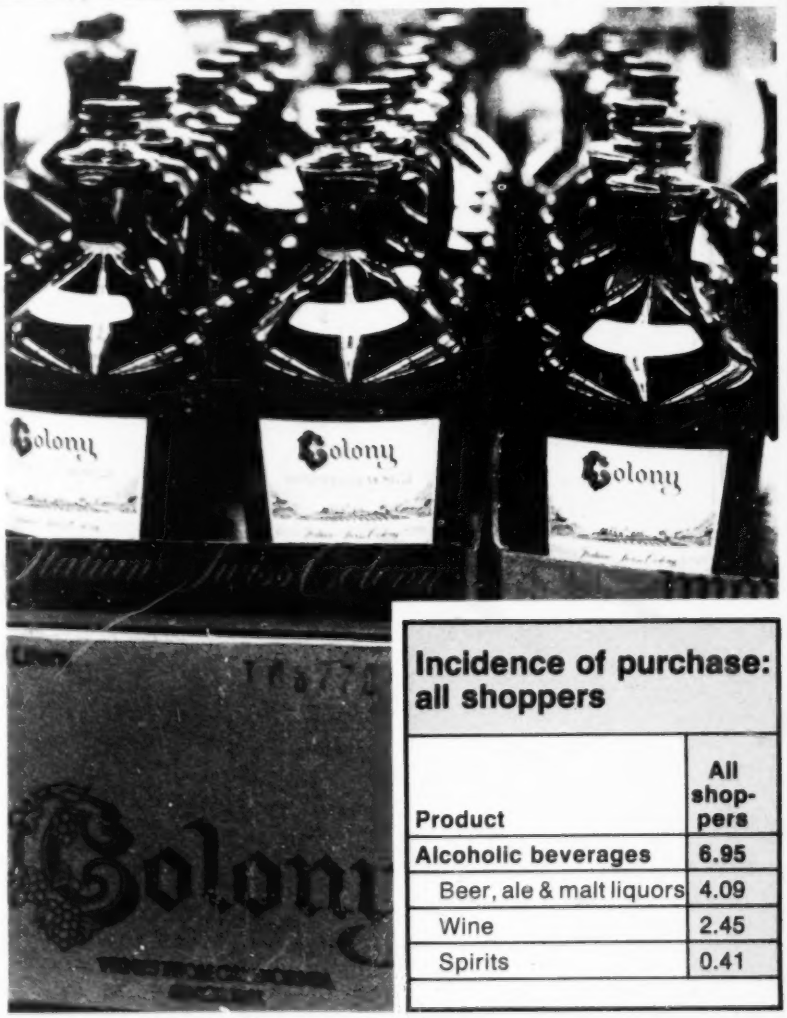
Shoppers in their 30's are the biggest alcoholic beverage buyers, purchasing at a rate of 9.01 per 100 shoppers. Those under 20 and over 60 use alcoholic beverages the least, while those in their 20's and 50's buy at a fairly high rate (5.26 and 4.16 per 100, respectively).

Beer buyers are somewhat younger. Shoppers in their 20's purchase at the highest rate—5.26—while those in their 30's buy slightly less frequently—4.99. The biggest wine buyers are in their 30's (2.75 purchases per 100), and the major spirit drinkers are in their 40's (.72 buys per 100).

Coffee. Coffee buyers are surprisingly big tea drinkers as well—they are 1.9 times as likely to buy tea—and the Consumer Buying Habits Study shows that they are also likely to buy doughnuts, cookies and tobacco.

The coffee buyer generally has a purchase plan mapped out before entering the store. More than half of all coffee buys are specifically planned before the shopper goes shopping, much higher than the 35.2% average rate for all commodity categories.

Shoppers who have general plans to buy coffee also constitute a small percentage, 7.4, compared to the all-categories average of 14.8%. And the substitute figure



Incidence of purchase: all shoppers

Product	All shoppers
Alcoholic beverages	**6.95**
Beer, ale & malt liquors	4.09
Wine	2.45
Spirits	0.41

for coffee is low, 2.9%, compared to the composite of 3.2% for all supermarket products.

Regular coffee still holds sway over this category, accounting for 63% of the purchases. Private label regular coffee is a better performer than private label instant coffee. The house brands of instant coffee make up for only 7% of the private label buys, while private label regular coffee posts a sizable 21%.

Coffee reacts very strongly to advertising and display together and moderately well to display and advertising used separately. IP rises three times when advertising is used and four times when in-store displays are employed. But when both promotions come into play, the purchase rate rises 13 times.

The figures also show that the purchase rate shoots skyward some 19 times when store ads and coupons are used together. Yet the figures indicate that retailers employ these aids only 3.1% of the time.

Purchases react strongly, although not as strongly, to other merchandising aids. Store circulars boost buys some four times; store coupons, eight times; store ads, four times; manufacturer newspaper coupons, two times. Manufacturer direct mail coupons boost purchases 25%, a miniscule figure when compared to the effect of other merchandising tools.

In spite of these promising figures, neither retailers nor manufacturers bolster coffee sales with promotional help very often. The study shows that retailers fail to provide help 77.8% of the time, and their biggest support goes to coupons, a good performer but not nearly as effective alone as when used in conjunction with store ads. Manufacturers fail to provide help 92.9% of the time, although in their case it is more understandable because their coupons are less efficient than the retailers.

Age and income analysis indicate that coffee is still popular among shoppers nearing middle age, and those in the lower and lower-middle income groups (unlike soft drink and alcoholic beverage buyers, who tend to be younger and more well-to-do). A

HOT TIPS

People who buy beer are

- **3.3 times as likely to buy tobacco**
- **1.7 times as likely to buy books and magazines**
- **1.6 times as likely to buy luncheon meats**
- **1.6 times as likely to buy ice cream**
- **0.9 times as likely to buy cheese**

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	product	+ Unplanned	= Store decision
Coffee, instant & regular	**100.0**	**56.3**	**7.4**	**2.6**	**0.3**	**33.3**	**43.6**
Instant coffee	100.0	51.5	8.7	2.9	0.4	36.5	48.5
Private label	100.0	35.3	11.8	5.9		47.1	64.8
Regular coffee	100.0	59.2	6.7	2.5	0.2	31.4	40.8
Private label	100.0	61.9	2.4	2.4		31.0	38.2

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Coffee, instant & regular	**0.79**	**0.60**	**2.52**	**1.93**	**8.05**
Instant coffee	0.62	0.55	0.81	1.15	2.07
Private label	0.44	0.37		1.90	
Regular coffee	0.95	0.64	3.88	2.74	10.51
Private label	2.16	1.32	8.81	5.95	2.63

Incidence of purchase: all shoppers

Product	All shoppers
Coffee, instant & regular	**16.60**
Instant coffee	6.20
Private label	0.44
Regular coffee	10.40
Private label	2.16

coffee drinker in his 40's will buy at a rate of 20.26 purchases per 100, compared to rates of 6.17, 11.71 and 11.69 for people in their teens, 20's and 30's, respectively. And a coffee user who is making $7,000-$9,999 a year will purchase at a rate of 18.57, 10% greater than a shopper making more than $25,000 a year. Instant coffee is more popular with the lower-income buyer, while higher-income shoppers opt more often for regular grind coffee.

A person in a poverty-level bracket, under $4,000 a year, will be more likely than not to buy instant coffee: 8.41 instant coffee buys per 100 compared to 5.65 for those at the $25,000 or more level.

Those in the lower-middle and upper-income brackets drink regular coffee at about the same rate, between 11 and 12 purchases per 100, while those at or near the poverty level buy at a frequency of between 6 and 8.

Tea and chocolate beverages. Unlike coffee purchases, the decision to buy tea conforms to the general trend of other supermarket commodities. The store decision level is 66.1%, a bit over the average, but most of the decisions are unplanned. A whopping 85% of the store decisions are unplanned, while the rest are either generally planned or substitutes.

The purchase rate for tea is 11.15, 49% less than that for coffee. Emphasis on instant tea by manufacturers in the last few years has given this item a big boost, and purchases of instant tea mixes total 42% of the whole tea category.

In spite of the large percentage of in-store decisions posted by tea buyers, tea doesn't respond nearly so well as coffee to in-store promotion. Purchases rise by 131% when

HOT TIPS

People who buy coffee are

- **1.9 times as likely to buy tea**
- **1.5 times as likely to buy cookies**
- **1.4 times as likely to buy tobacco**
- **1.4 times as likely to buy doughnuts and sweet rolls**
- **0.75 times as likely to buy baby food**

Incidence of purchase: all shoppers

Product	All shoppers
Tea & chocolate beverages, beverage mixes	**12.18**
Cocoa & chocolate syrup	1.03
Chocolate or cocoa drink mixes	3.81
Tea, instant tea, mixes	4.66
Private label	0.59
Beverage mixes	2.68
Private label	0.15

displays are used, and they double when advertising comes into play. Advertising and display boost buys by 185%, so if a decision has to be made between coffee and tea promotions, coffee is the choice.

The presence of a woman and, surprisingly, a child in the shopping group boosts purchases significantly. A woman will buy tea and chocolate beverages at a rate of 11.68 purchases per 100 shoppers. For a man, the figure is 7.2. If two women go shopping, the figure jumps to 13.2. Add a child to the group, and the IP rises again to 17.1. A man, woman and child push the figure up to 20.78.

Also in contrast to coffee drinkers, tea drinkers are a bit younger. The highest purchase rates, 16.57 and 15.32, were recorded for those in their 30's and 20's, respectively. The lowest rates, 8.64, 8.32 and 8.66, were tabulated among those in their teens, 50's and 60's. ■

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Tea & chocolate beverages, beverage mixes	**100.0**	**33.8**	**5.5**	**3.4**	**0.8**	**56.4**	**66.1**
Cocoa & chocolate syrup	100.0	47.5	5.0			47.5	52.5
Chocolate or cocoa drink mixes	100.0	31.1	4.1	4.1	1.4	59.5	68.9
Tea, instant tea, mixes	100.0	38.1	8.3	3.3		50.3	61.9
Private label	100.0	43.5	17.4			39.1	56.5
Beverage mixes	100.0	25.0	2.9	3.8	1.9	66.3	74.3
Private label	100.0			33.3	16.7	50.0	100.0

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Tea & chocolate beverages, beverage mixes	**0.64**	**0.55**	**1.27**	**1.10**	**1.67**
Cocoa & chocolate syrup	0.51	0.44		5.07	
Chocolate or cocoa drink mixes	0.63	0.49	1.59	0.99	1.80
Tea, instant tea, mixes	0.78	0.72	0.63	1.38	2.08
Private label	0.59	0.51		1.92	1.01
Beverage mixes	0.54	0.47	1.80	0.41	
Private label	0.15	0.08	15.79		